

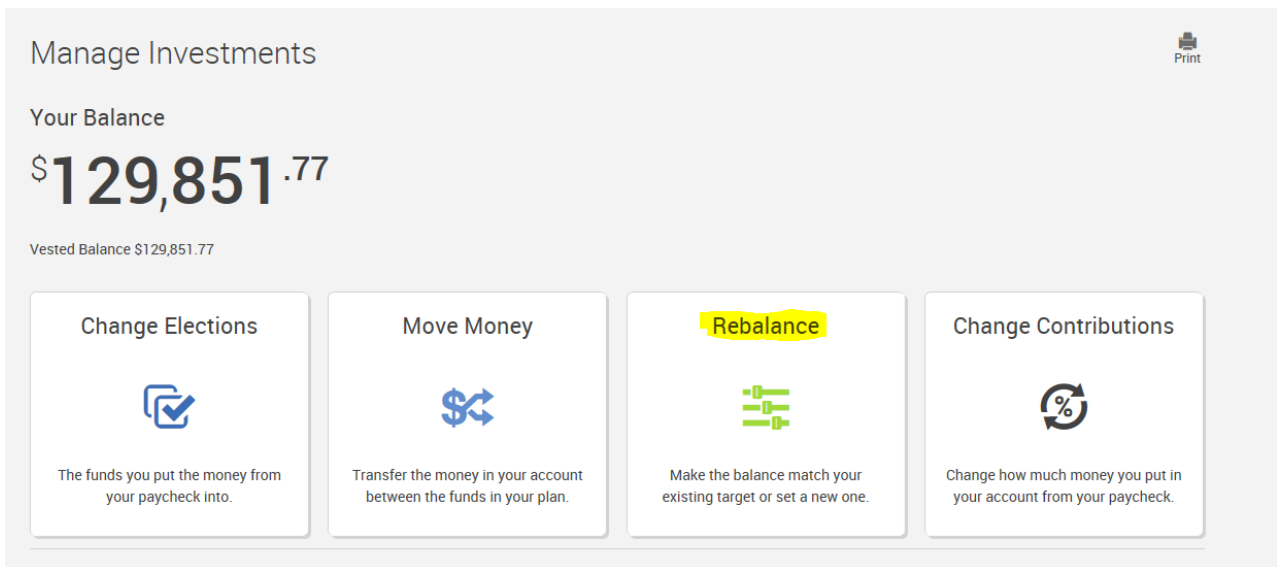
# Recurring Rebalance

 [Show Me How to Schedule Automatic Rebalancing](#)

To manage your investments or contributions, choose [Manage Investments](#) from the [Manage My Account](#) menu. From here you can update your future investment elections by selecting [Change Elections](#), you can [Move Money](#) which allows you to move specific funds or a portion of a fund into another fund(s), or you can **Rebalance** your entire account by realigning your fund percentages.

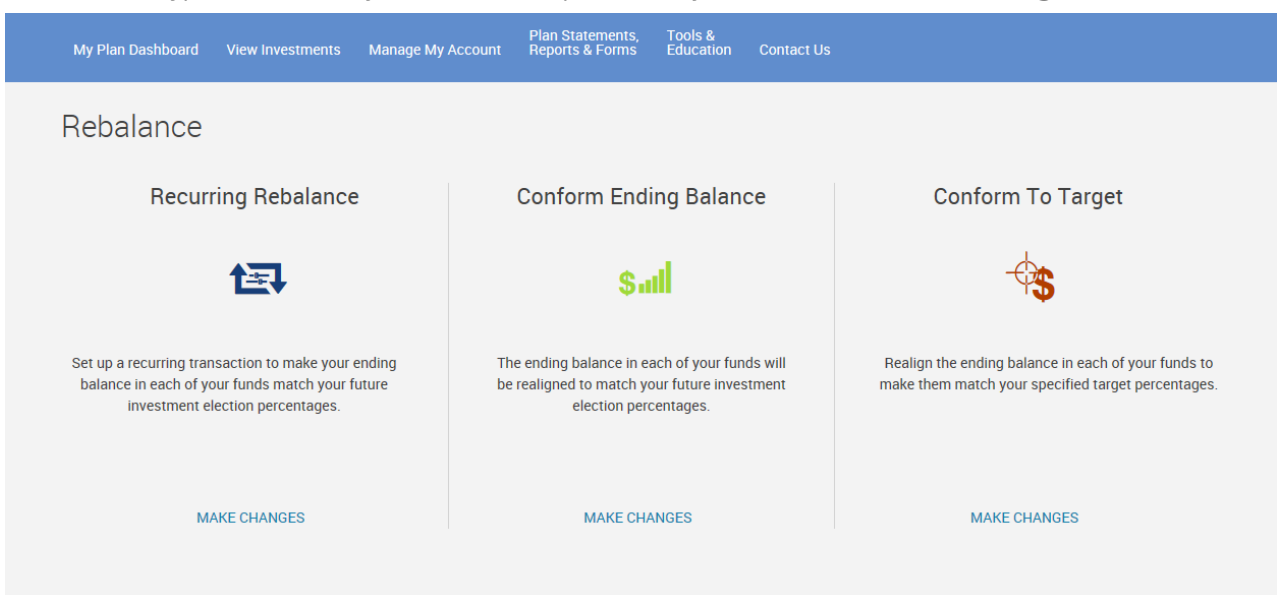
## **REBALANCE**

1. Select **Rebalance** from **Manage Investments** menu.



The screenshot shows the 'Manage Investments' dashboard. At the top, it says 'Manage Investments' with a 'Print' icon. Below that, 'Your Balance' is displayed as '\$129,851.77' and 'Vested Balance \$129,851.77'. There are four main action buttons: 'Change Elections', 'Move Money', 'Rebalance' (which is highlighted in yellow), and 'Change Contributions'. Each button has an icon and a brief description of its function.

2. Select the type of rebalance you would like to process on your account: Click **Make Changes**



The screenshot shows the 'Rebalance' options page. At the top, there is a navigation bar with links: 'My Plan Dashboard', 'View Investments', 'Manage My Account', 'Plan Statements, Reports & Forms', 'Tools & Education', and 'Contact Us'. Below the navigation bar, the title 'Rebalance' is displayed. There are three main options: 'Recurring Rebalance', 'Conform Ending Balance', and 'Conform To Target'. Each option has an icon, a description, and a 'MAKE CHANGES' button.

If you would like to have your account balance reset back to the elections automatically throughout the year,

**Recurring Rebalance** is the option you will need to select.

You can also **Conform to Target** to update your fund elections to new percentages, or select **Conform Ending Balance** to have your rebalance occur on demand.

**Recurring Rebalance:**

3. Set your preferences for frequency and date on which you would like the rebalance to occur.

***Please note** - you will not make any election changes during this transaction.*

4. **Enter** the threshold percentage for the rebalance. This will rebalance the total balance that is above the set percentage. The default percentage is 0% and this will ensure the entire account rebalances. If you do not want all funds to rebalance update the percentage to your desired amount.

5. Click **next** and follow the steps to complete the transaction. Once you submit the request you will receive a 6-digit confirmation number letting you know you have completed the transaction.

---